



Hot Folders Configuration Guide infoRouter - Version 7.5

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Description

This application is an NT Service that polls NT File System Folders on a scheduled interval and imports the contents of these folders into infoRouter. It supports Meta data importing as well.

Requirements

The server on which this utility runs must have HTTP access and connection to the infoRouter Document Server.

This service requires infoRouter version 7.2 or greater.

The server on which this utility runs must be configured to run Windows 2000, Windows 2003 or Windows XP Pro Operating Systems

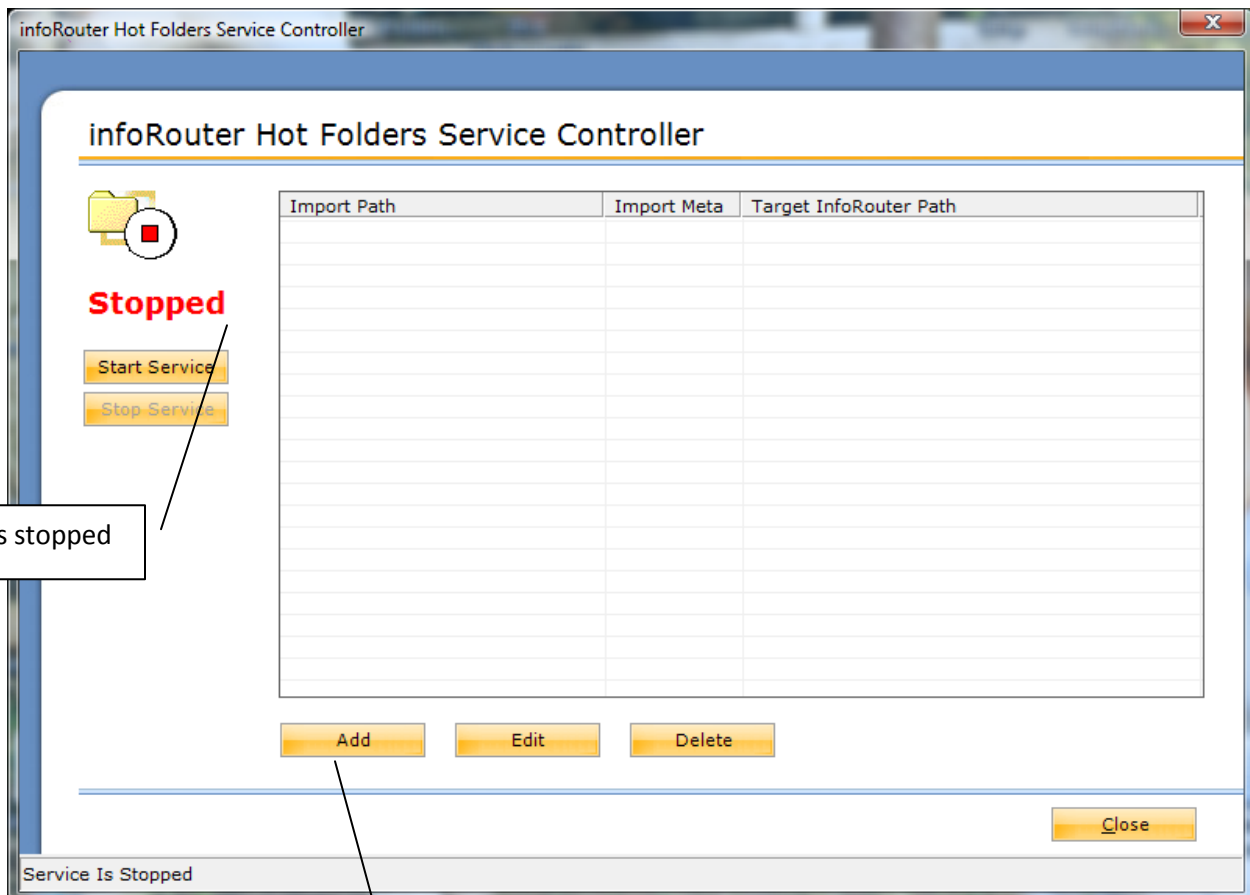
Installation

The setup.msi file is located under "infoRouter installation path\Program Setups\HotFolders" directory. Run this setup program and follow the onscreen instructions. Program installation defaults to the "C:\IRHOTFOLDERS" directory but this can be changed during the installation process.

Configuration

Use the “HotFoldersServiceManager.exe” to configure and manage the service.

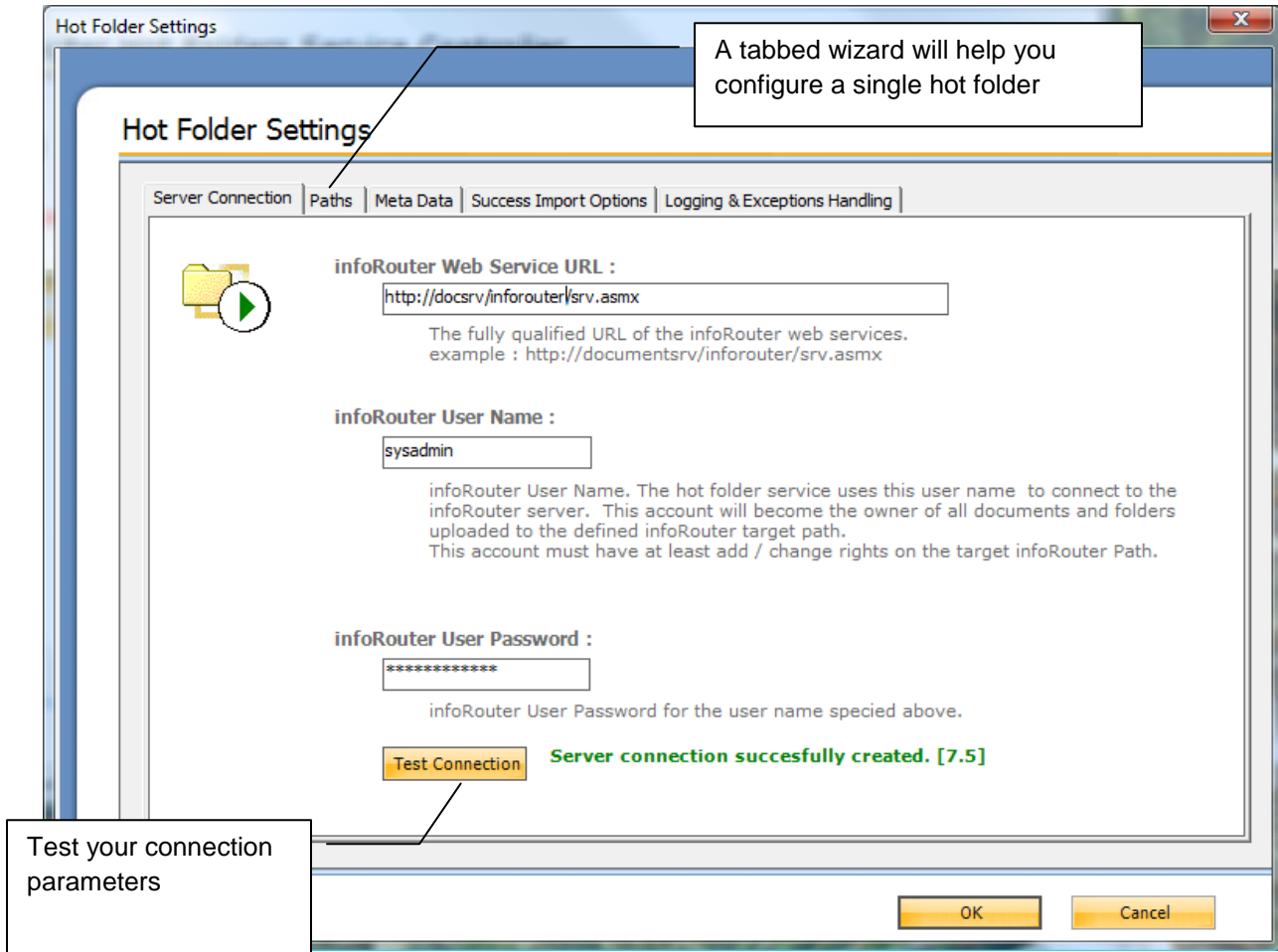
The following screen will be displayed:



Click the “Add” button to add a new hotfolder path.

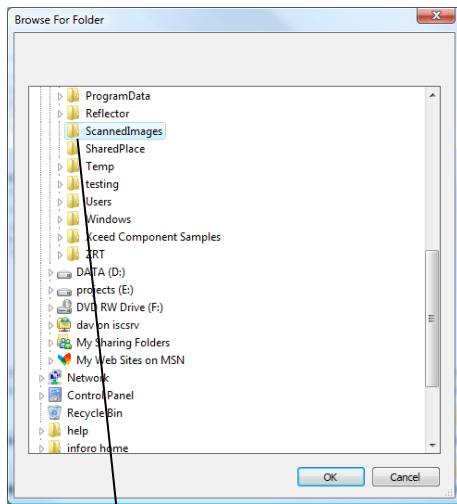
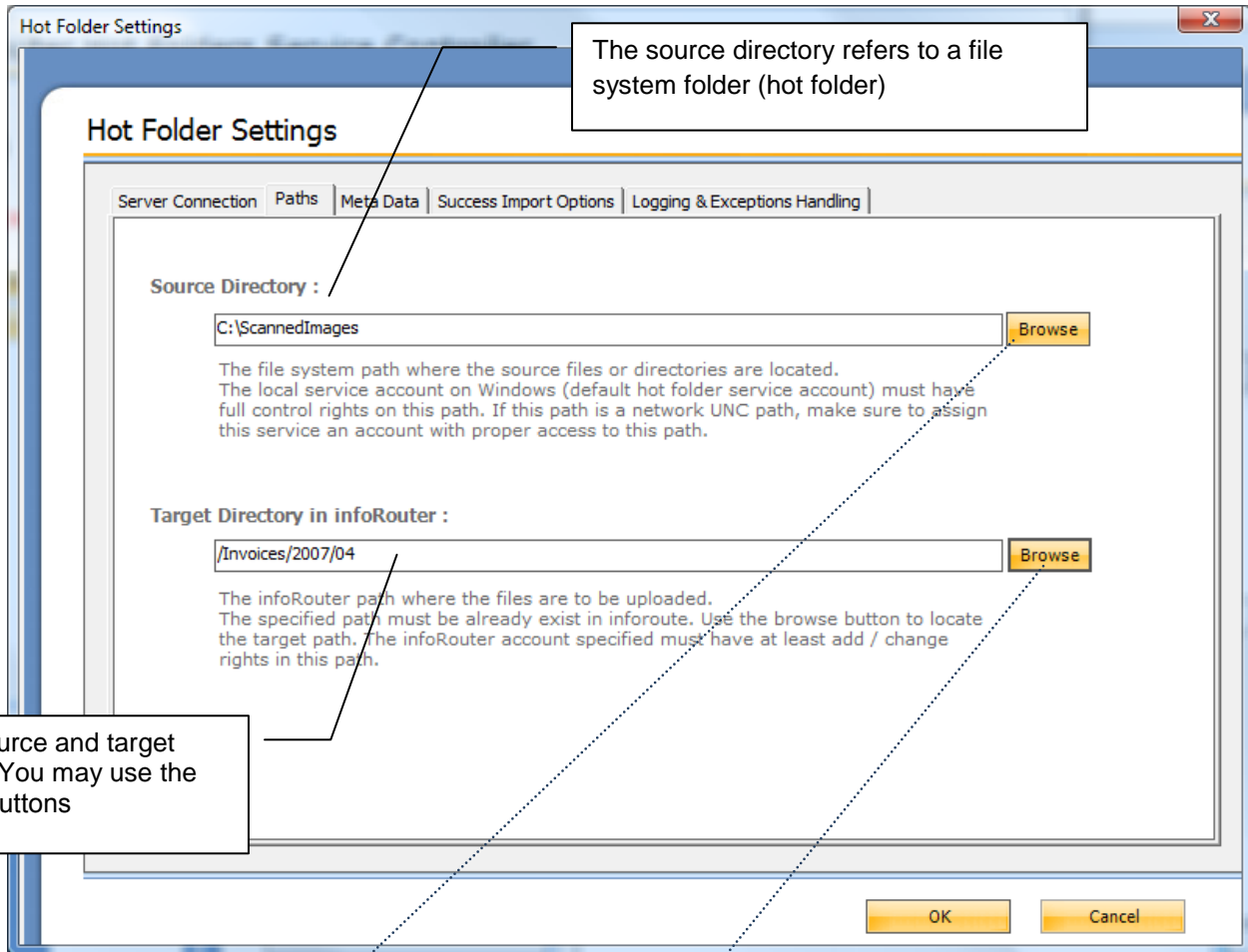
Connecting to infoRouter

Follow the on screen configuration instructions and type the connection and login information.

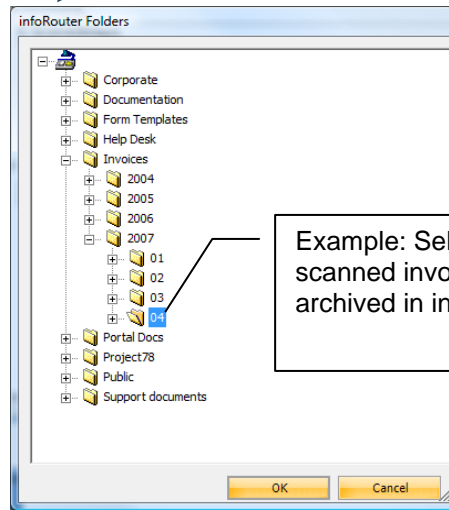


Selecting Source and Target Paths

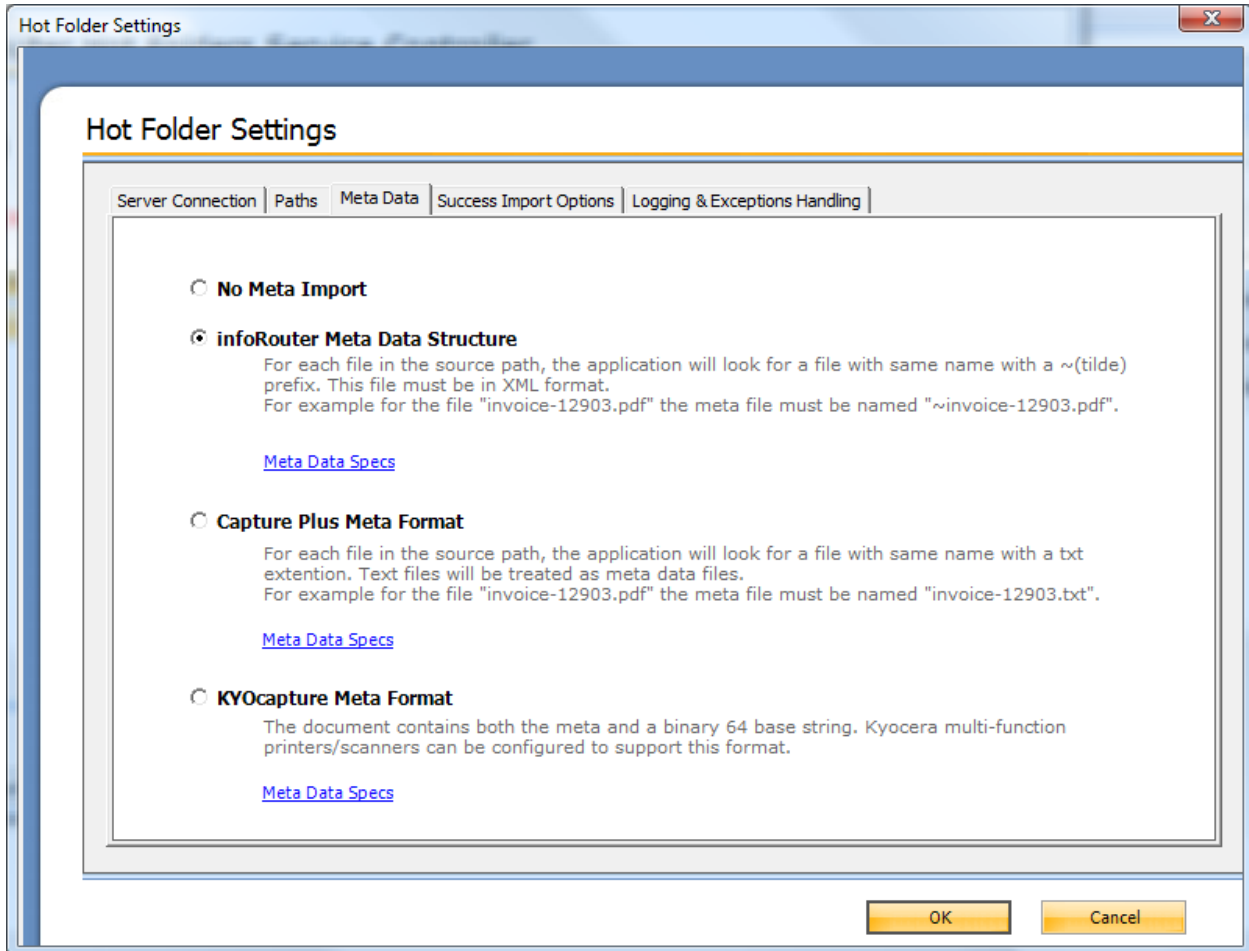
Click the paths tab. Enter source and target directories.



Example: Select the source folder where your scanned Invoices are pooled. You may use the "browse" buttons.



Example: Select the folder where scanned invoices will be processed or archived in infoRouter.



Hot folders support three different Meta data formats:

1 – InfoRouter Meta Data Structure:

For each file in the source path, the application will look for a file with same name with a ~(tilde) prefix. This file must be in XML format. For example for the file "invoice-12903.pdf" the Meta file must be named "~invoice-12903.pdf".

A sample Meta file is shown below. Meta file must be in valid XML 1.0 format.

```
<irdoc description="Lorem dolor sit amet..." updateinstructions="Lorem dolor sit amet...">
  <propertysets>
    <propertyset NAME="INVOICEHEAD">
      <propertyrow INVOICENBR="9234234" BILLINGADDRESS="ABC INC. 7th ST. 89C ATLANTA US 06349" SHIPPINGADDRESS="ABC INC. MAC DIV 12 th ST. #45 ATLANTA US" AMOUNT="780.92" />
    </propertyset>
    <propertyset name="INVOICEDETAILS">
      <propertyrow ITEMNAME="893MS" QUANTITY="3" QUANTITYAMOUNT="100.00" TOTAL="300.00" />
      <propertyrow ITEMNAME="78SMMJJ3" QUANTITY="1" QUANTITYAMOUNT="480.92" TOTAL="480.92" />
    </propertyset>
  </propertysets>
</irdoc>
```

Remarks:

<code>irdoc.description</code>	Will be assigned as the document description of the imported document
<code>irdoc.updateinstructions</code>	Will be assigned as document update instructions
<code>irdoc.doctypeid</code>	Will be the document type
<code>irdoc.flowdefid</code>	Will be the flow definition id that the document to be submitted
<code>Propertyset.NAME</code>	Value of the Name attribute of property set item must match to an existing infoRouter custom property set name.
<code>propertyrow. (*)</code>	The attribute names of the propertysetrow item must match the field names of the custom property set.

The values of data must be in the convertible format to infoRouter custom property field data types.

If a custom property set field defined as a required field type then this field must have value in the property set row.

2 – Capture plus Meta Format:

For each file in the source path, the application will look for a file with same name with “.txt” extension.

For example for the file "invoice-12903.pdf" the Meta file must be named "invoice-12903.txt".
The meta file in a special format like below.

```
1233=doctypeid
123456=flowdefid
INVOICE=Custom Property Name
ABC INC=CUSTOMER
90909=INVOICENUMBER
2002-04-03=INVOICEDATE
5000=AMOUNT
```

Note: “=flowdefid” declaration must take place before custom properties declarations.

If the program see “=Custom Property Name” as suffix that subsequent line must have the values of the specified custom property fields.

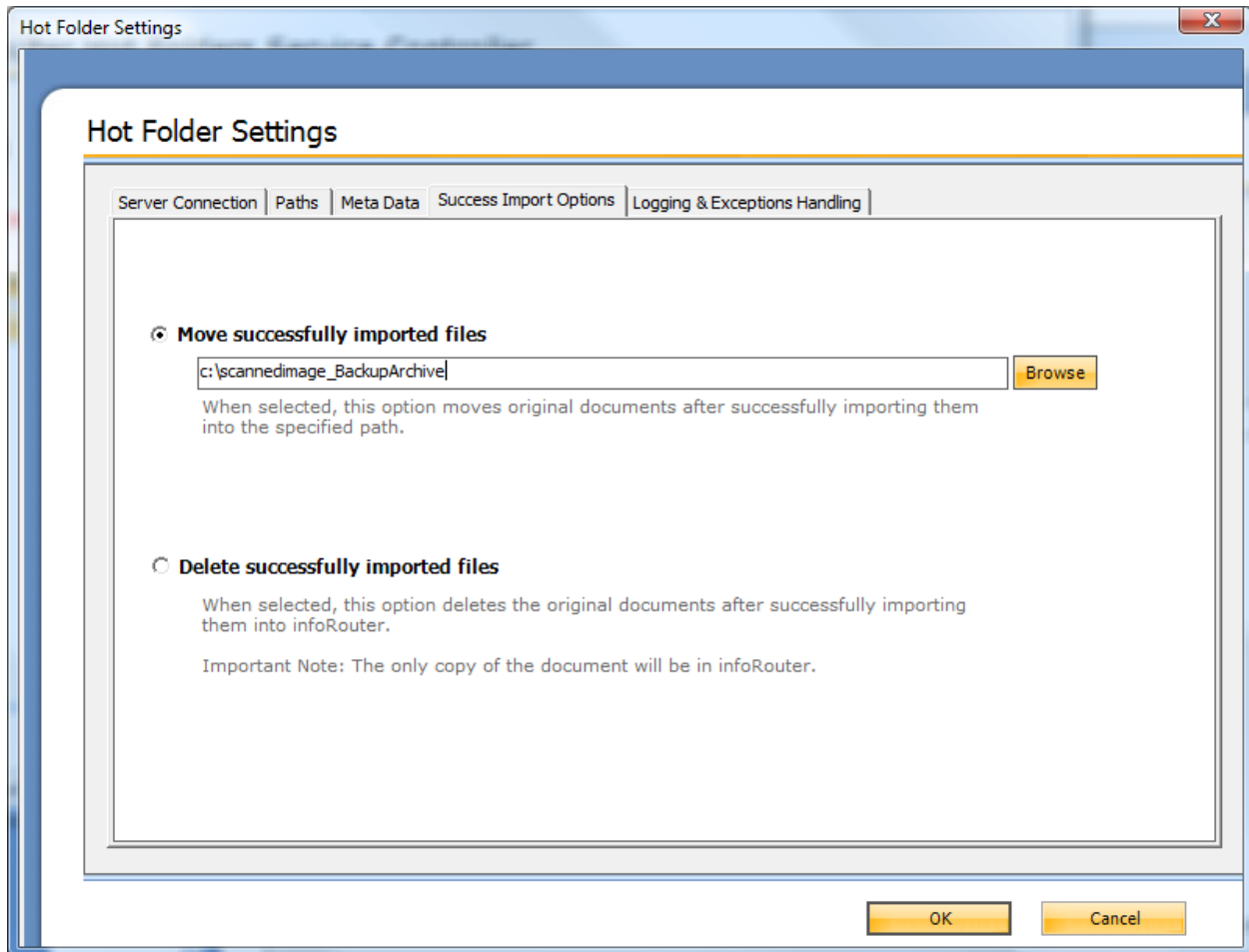
Note: This Meta format have very limited support and preserved for backward compatibility. We recommend “infoRouter Meta Data Structure”.

3 – KYOCapture Plus Meta Format:

This format supports especially for the KYOCERA scanners. The file content that is subject to import is the part of the big xml file. The Meta data is also part of the xml file.

For each file in the source path, the application will look for a file with same name with “.txt” extension. For example for the file "invoice-12903.pdf" the Meta file must be named "invoice-12903.txt". The Meta file in a special format like below.

```
<AutoStore>
<KnowledgeObjects Count="1">
<KnowledgeObject>
<KnowledgeDocuments Count="1">
<KnowledgeDocument Content="[base64 encoded] doc content" Type="pdf"
Name="AS_002C9302_0041_000.pdf"/>
</KnowledgeDocuments>
<KnowledgeFields>
<Field Name="FOLDER" Value="Client Documents"/>
<Field Name="DOCTYPEID" Value="1312321"/>
<Field Name="FLOWDEFID" Value="1434"/>
<Field Name="CSET.CLIENTS.CLIENTNAME" Value="Johnson Computers"/>
<Field Name="CSET.CLIENTS.DOCUMENTTYPE" Value="Tax Return"/>
<Field Name="CSET.CLIENTS.DATE" Value="2/5/2007"/>
</KnowledgeFields>
</KnowledgeObject>
</KnowledgeObjects>
</AutoStore>
```



Selecting Logging Options

Select the logging directories.

